

SUMTER COUNTY BOARD OF COMMISSIONERS
EXECUTIVE SUMMARY

SUBJECT: State Housing Initiatives Partnership (SHIP) Program

☐ Work Session (Report Only)

☒ Regular Meeting

DATE OF MEETING: 9/8/09

☐ Special Meeting

CONTRACT: ☐ N/A

Effective Date: 7/1/08

Managing Division / Dept:

Vendor/Entity: SHIP funds

Termination Date: 6/30/11

Housing Department

BUDGET IMPACT:

☒ Annual

☐ Capital

☐ N/A

FUNDING SOURCE: N/A

EXPENDITURE ACCOUNT: _____

REQUESTED ACTION: Approve Annual Report

HISTORY/FACTS/ISSUES:

The SHIP (State Housing Initiatives Program) Grant is through a dedicated trust fund for housing. The funds are distributed through the Florida Housing Finance Corporation and are based on revenues from Documentary Stamps for all approved counties and entitlement cities in Florida. Sumter County received \$886,351 for Fiscal Year July 1, 2008 through June 30, 2009.

The funds are used for various housing projects, including replacement or rehabilitation of substandard homes, down payment and closing costs (DPCC), rental deposits, emergency repair and disaster assistance. Rehabilitation, replacement, emergency repair and disaster assistance strategies are only for applicants who currently own and occupy the residence. Down payment and closing costs are for applicants who will own and occupy a unit. The only strategy available for applicants who are renting units is the rent deposit strategy, which is available to eligible Section 8 Participants.

The following is a breakdown of the Fiscal Yearend Closeout Reports for Florida Housing Finance Corporation. The fiscal breakdowns are as follows:

Fiscal Year 2006/2007

\$905,464.43 expended funds

37 families assisted

6 new homes constructed

6 emergency repairs

20 down payment assistance

5 security/utility deposits

Fiscal Year 2007/2008

\$ 798,981.65 expended funds

49 families assisted

10 new homes constructed

5 emergency repairs

20 down payment assistance

14 security/utility deposits

\$ 45,475.82 encumbered funds

1 family for new construction

Fiscal Year 2007/2008

\$ 209,973.23 expended funds

7 families assisted

1 emergency repairs

6 down payment assistance

\$ 306,435.95 encumbered funds

6 families for new construction

1 family for emergency repair
4 families for down payment assistance

Of the 93 families we completed assistance for, 19 were elderly and 18 were disabled.

Fiscal Year 2008/2009

\$ 895,404.00 received from Florida Housing Finance Corporation

\$ 35,863.26 paid back from clients

\$ -1019.72 received in interest

\$ 930,247.54 Total funds received for housing assistance in 08/09

SHIP Annual Report

Sumter County 2006 Closeout

Report Status: Unsubmitted

Form 1

SHIP Distribution Summary

Homeownership

Code	Strategy	Expended Amount	Units	Encumbered Amount	Units	Unencumbered Amount	Units
3	Home Rehabilitation	\$352,290.30	6	\$.00	0	\$.00	0
1	Home Purchase	\$447,733.27	20	\$.00	0	\$.00	0
6	Emergency Repair	\$24,967.12	6				
Homeownership Totals:		\$824,990.69	32	\$.00	0	\$.00	0

Rentals

Code	Strategy	Expended Amount	Units	Encumbered Amount	Units	Unencumbered Amount	Units
23	Rent Deposits	\$2,453.00	5	\$.00	0	\$.00	0
Rental Totals:		\$2,453.00	5	\$.00	0	\$.00	0
Subtotals:		\$827,443.69	37	\$.00	0	\$.00	0

Additional Use of Funds

Use	Expended	Encumbered	Unencumbered
Administrative	\$69,009.70		
Homeownership Counseling	\$2,500.00		
Admin From Program Income	\$6,511.04		
Admin From Disaster Funds	\$.00		

Totals:	\$905,464.43	37	\$.00	0	\$.00	0
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Total Revenue (Actual and/or Anticipated) for Local SHIP Trust Fund

Source of Funds	Amount
State Annual Distribution	\$690,097.00
Program Income (Interest)	\$65,816.65
Program Income (Payments)	\$150,511.96
Recaptured Funds	
Disaster Funds	
Other Funds	
Carryover funds from previous year	\$341.77

Total: \$906,767.38 * Carry Forward to Next Year: \$1,302.95

NOTE: This carry forward amount will only be accurate when all revenue amounts and all expended, encumbered and unencumbered amounts have been added to Form 1

Rental Unit Information

Description	Eff.	1 Bed	2 Bed	3 Bed	4 Bed
Rent Deposits	\$.00	\$468.00	\$493.00	\$700.00	\$.00

Recap of Funding Sources for Units Produced

Source of Funds Produced through June 30th for Units	Amount of Funds Expended to Date	% of Total Value
SHIP Funds Expended	\$827,443.69	26.66%
Public Moneys Expended	\$722,374.00	23.27%
Private Funds Expended	\$1,510,633.00	48.67%
Owner Contribution	\$43,424.59	1.40%
Total Value of All Units	\$3,103,875.28	100.00%

SHIP Program Compliance Summary - Home Ownership/Construction/Rehab

Compliance Category	SHIP Funds	Trust Funds	% of Trust Fund	FL Statute Minimum %
Homeownership	\$824,990.69	\$690,097.00	119.55%	65%
Construction / Rehabilitation	\$589,757.42	\$690,097.00	85.46%	75%

Program Compliance - Income Set-Asides

Income Category	SHIP Funds Expended	SHIP Funds Encumbered	SHIP Funds Unencumbered	Total of SHIP Funds	Total Available Funds % *
Extremely Low	\$81,631.32			\$81,631.32	9.00%
Very Low	\$341,094.30			\$341,094.30	37.62%
Low	\$374,718.07			\$374,718.07	41.32%
Moderate	\$30,000.00			\$30,000.00	3.31%
Totals:	\$827,443.69	\$.00	\$.00	\$827,443.69	91.25%

Special Target Groups for Funds Expended (i.e. teachers, nurses, law enforcement, fire fighters, etc.) Set Aside

Description	Special Target Group	Expended Funds	Total # of Expended Units

Project Funding for Expended Funds Only

Income Category	Total Funds Mortgages, Loans & DPL's	Mortgages, Loans & DPL Unit #s	Total Funds SHIP Grants	SHIP Grant Unit #s	Total SHIP Funds Expended	Total # Units
Extremely Low	\$74,605.45	5	\$7,025.87	2	\$81,631.32	7
Very Low	\$333,848.30	8	\$7,246.00	1	\$341,094.30	9
Low	\$364,022.82	14	\$10,695.25	3	\$374,718.07	17
Moderate	\$30,000.00	4	\$.00	0	\$30,000.00	4

Totals: \$802,476.57 31 \$24,967.12 6 \$827,443.69 37

Form 3

Number of Households/Units Produced

Description	List Unincorporated and Each Municipality	ELI	VLI	Low	Mod	Total
Emergency Repair	Bushnell	1				1
Emergency Repair	Sumter County	1	1	2		4
Emergency Repair	Wildwood			1		1
Rehab/Replacement	Sumter	1	4	1		6
Home Purchase	Bushnell			2		2
Home Purchase	Sumter		3	6	2	11
Home Purchase	Wildwood			5	2	7
Rent Deposits	Bushnell	1				1
Rent Deposits	Sumter	3	1			4
Totals:		7	9	17	4	37

Characteristics/Age (Head of Household)

Description	List Unincorporated and Each Municipality	0 - 25	26 - 40	41 - 61	62+	Total
Emergency Repair	Bushnell			1		1
Emergency Repair	Sumter County			3	1	4
Emergency Repair	Wildwood				1	1
Rehab/Replacement	Sumter			2	4	6
Home Purchase	Bushnell		1	1		2
Home Purchase	Sumter		9	2		11
Home Purchase	Wildwood	3	3	1		7
Rent Deposits	Bushnell		1			1
Rent Deposits	Sumter	3		1		4
Totals:		6	14	11	6	37

Family Size

Description	List Unincorporated and Each Municipality	1 Person	2- 4 People	5+ People	Total
Emergency Repair	Bushnell	1			1
Emergency Repair	Sumter County	1	3		4
Emergency Repair	Wildwood		1		1
Rehab/Replacement	Sumter	2	4		6
Home Purchase	Bushnell			2	2

Home Purchase	Sumter	4	4	3	11
Home Purchase	Wildwood		7		7
Rent Deposits	Bushnell		1		1
Rent Deposits	Sumter	2	2		4
Totals:		10	22	5	37

Race (Head of Household)

Description	List Unincorporated and Each Municipality	White	Black	Hispanic	Asian	Amer-Indian	Other	Total
Emergency Repair	Bushnell		1					1
Emergency Repair	Sumter County	3		1				4
Emergency Repair	Wildwood	1						1
Rehab/Replacement	Sumter	2	4					6
Home Purchase	Bushnell	2						2
Home Purchase	Sumter	10		1				11
Home Purchase	Wildwood	2	5					7
Rent Deposits	Bushnell	1						1
Rent Deposits	Sumter	1	3					4
Totals:		22	13	2				37

Special Needs (Any Member of Household)

Description	List Unincorporated and Each Municipality	Farm Worker	Devel. Disabled	Homeless	Elderly	Special Needs	Special Needs	Total
Emergency Repair	Bushnell							0
Emergency Repair	Sumter County				1	1		2
Emergency Repair	Wildwood				1	1		2
Rehab/Replacement	Sumter				4	2		6
Home Purchase	Bushnell							0
Home Purchase	Sumter					1		1
Home Purchase	Wildwood					1		1
Rent Deposits	Bushnell							0
Rent Deposits	Sumter					2		2
Totals:					6	8		14

Form 4**Status of Incentive Strategies**

Incentive Strategy:

Expedited Permitting

On-going review of policies, procedures and Comprehensive Plan Amendments

Adopting Ordinance or Resolution Number or identify local policy:

Sumter County Ordinance No. 93-1

Implementation Schedule (Date):

Expedited Permitting - Building Department has provided information regarding permitting and verified all SHIP projects were approved in 3 days or less if all information was provided by the contractor to the department. The AHAC committee is now meeting quarterly to continue review of policies, procedures, etc. and will continue to make recommendations to the Board of County Commissioners.

Has the plan or strategy been implemented? If no, describe the steps that will be taken to implement the plan:

Expedited Permitting - The strategy is currently being implemented.
On-going Review - The strategy is currently being implemented.

Status of Strategy - (Is the strategy functioning as intended, i.e. are the time frames being met, etc.):

Expedited Permitting - This strategy is working as intended and permits have been issued within the time frames.
On-going Review - The AHAC committee has given very valuable input into Affordable Housing and has presented recommendations as a team of professionals, leading to the county becoming more aware of the need for affordable housing. The AHAC made their recommendations to the Board of County Commissioners prior to the statute deadline.

Support Services

The Sumter County Housing Department now has 2 certified Homeownership Counselors through NeighborWorks and they also completed certification on Foreclosure Prevention. Counseling services are provided to all residents of the community. Sumter County has also partnered with DCF to assist families in applying for food stamps and medicaid online.

Other Accomplishments

Sumter County received a CDBG grant to replace 10 substandard homes. With the match of SHIP funds, we were able to replace 14 homes and rehabilitate 3 homes to bring them up to code. Other accomplishments will be sent separately with signed certifications.

Availability for Public Inspection and Comments

The public is notified of the availability of the annual reports and where they are located through the Board of Commissioners meetings and advertised on the county website. The reports are made available to the public Monday through Friday, 8:30am - 5:00pm at the Sumter County Housing Department, 910 North Main Street, Suite 301, Bushnell, FL 33513 for inspection and comments.

Default and Foreclosure

Mortgage Foreclosures

- A. Very low income households in foreclosure: 0
- B. Low income households in foreclosure: 2
- C. Moderate households in foreclosure: 2

Mortgage Defaults

- A. Very low income households in default: 2
- B. Low income households in default: 3
- C. Moderate households in default: 2

Welfare to Work Programs

There are no eligible sponsors

Strategies and Production Costs

Strategy	Average Cost
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Expended Funds

Total Unit Count: 37

Total Expended Amount: \$827,444.00

Strategy	Full Name	Address	City	Zip Code	Expended Funds	Unit Counted
Emergency Repair	Charlene Shuman	709 N Warfield Avenue	Wildwood	34785	\$2,070.00	<input type="checkbox"/>
Emergency Repair	Margaret Rhames	406 S Pine Street	Bushnell	33513	\$4,375.87	<input type="checkbox"/>
Emergency Repair	Auelina Rivero	1051 CR 464	Lake Panasoffkee	33538	\$7,246.00	<input type="checkbox"/>
Emergency Repair	Linda Johnson	103 CR 491	Lake Panasoffkee	33538	\$6,850.25	<input type="checkbox"/>
Emergency Repair	Darrel Allen	1936 CR 439C	Lake Panasoffkee	33538	\$1,775.00	<input type="checkbox"/>
Emergency Repair	Carmen Covington	4113 CR 400	Lake Panasoffkee	33538	\$2,650.00	<input type="checkbox"/>
Home Rehabilitation	Steven Harvey	2884 CR 422	Lake Panasoffkee	33538	\$72,652.45	<input type="checkbox"/>
Home Rehabilitation	Cheryl Bailey	7581 CR 747	Webster	33597	\$3,417.75	<input type="checkbox"/>
Home Rehabilitation	Arthur Mae & Cisro Hill	5423 CR 707	Webster	33597	\$73,516.80	<input type="checkbox"/>
Home Rehabilitation	Norma Bevans	11445 CR 675	Webster	33597	\$66,316.90	<input type="checkbox"/>
Home Rehabilitation	Zell & Daisy Mitchell	11064 CR 723	Webster	33597	\$70,096.85	<input type="checkbox"/>
Home Rehabilitation	Delphenia Boule	9698 CR 229	Wildwood	34785	\$66,289.55	<input type="checkbox"/>
Home Purchase	Linda Galbraith	109 Arnold Court	Wildwood	34785	\$10,000.00	<input type="checkbox"/>
Home Purchase	Sharon Corbin	702 Wilson Street	Wildwood	34785	\$30,000.00	<input type="checkbox"/>
Home Purchase	Lise Millette	9299 CR 631	Bushnell	33513	\$40,000.00	<input type="checkbox"/>
Home Purchase	Alicia Sloan	912 Ida Street	Wildwood	34785	\$7,500.00	<input type="checkbox"/>
Home Purchase	Urbano Jasso	904 Ida Street	Wildwood	34785	\$7,500.00	<input type="checkbox"/>
Home Purchase	Amy Pinder	700 Wilson Street	Wildwood	34785	\$7,500.00	<input type="checkbox"/>
Home Purchase	Scott & Tina Shumaker	321 W Dade Avenue	Bushnell	33513	\$6,376.57	<input type="checkbox"/>
Home Purchase	Patton & Lisa Ratliff	1020 CR 465	Lake Panasoffkee	33538	\$30,000.00	<input type="checkbox"/>
Home Purchase	Deanna Meadows	2810 SE 75th Blvd.	Bushnell	33513	\$5,000.00	<input type="checkbox"/>
Home Purchase	Roger & Marcelline Thompson	605 Ross Street	Wildwood	34785	\$30,000.00	<input type="checkbox"/>

Home Purchase	Amanda Rogers	2313 CR 446	Lake Panasoffkee	33538	\$30,000.00	<input type="checkbox"/>
Home Purchase	Michelle & Bruce Mock	7613 W C-48	Bushnell	33513	\$40,000.00	<input type="checkbox"/>
Home Purchase	Oscar Lemus	1809 CR 654	Bushnell	33513	\$30,000.00	<input type="checkbox"/>
Home Purchase	Elizabeth Jackson	909 Ida Street	Wildwood	34785	\$5,000.00	<input type="checkbox"/>
Home Purchase	Elgie Cannon	419 N CR 470	Lake Panasoffkee	33538	\$29,706.70	<input type="checkbox"/>
Home Purchase	Jason & Tara Dearman	1048 CR 452	Lake Panasoffkee	33538	\$30,000.00	<input type="checkbox"/>
Home Purchase	Cynthia & Jimmy Wise	224 E. Vermont Street	Bushnell	33513	\$29,150.00	<input type="checkbox"/>
Home Purchase	John & Amanda Miles	9377 CR 622	Bushnell	33513	\$40,000.00	<input type="checkbox"/>
Home Purchase	Renee Gaige	5409 CR 125	Wildwood	34785	\$10,000.00	<input type="checkbox"/>
Home Purchase	Carla Lemay	370 CR 487A	Lake Panasoffkee	33538	\$30,000.00	<input type="checkbox"/>
Rent Deposits	Shambrica Bailey	910 CR 482N Apt 26	Lake Panasoffkee	33538	\$460.00	<input type="checkbox"/>
Rent Deposits	Konita Deckard	1000 Meadows Circle Apt 24	Bushnell	33513	\$493.00	<input type="checkbox"/>
Rent Deposits	Makayla Grady	301 E Gulf Atl Hwy 44 Apt 7	Wildwood	34785	\$500.00	<input type="checkbox"/>
Rent Deposits	Albert Grilli	1081 CR 479 Apt 61	Lake Panasoffkee	33538	\$500.00	<input type="checkbox"/>
Rent Deposits	Charlene Brutton	10431 SW 60th Terrace	Bushnell	33513	\$500.00	<input type="checkbox"/>

Administrative Expenditures

Salaries and Benefits	\$ 72,955.04
Contractual Services	\$ 435.00
Communication	\$ 461.81
Postage	\$ 180.47
Repair and Maintenance	\$ 24.95
Printing and Binding	\$ 14.74
Legal Advertising	\$ 315.24
Recording Fees	\$ 282.80
Office Supplies	\$ 416.13
Books, Subscriptions, Dues	\$ 434.56

Sub Recipients and Consultants

Name	Business Type	Strategy Covered	Responsibility
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Program Income

Program Income Funds	
Loan Repayment:	\$150,511.96
Refinance:	
Foreclosure:	

Sale of Property:	
Interest Earned:	\$65,816.65
Other ():	

Total: \$216,328.61

Sumter County 2006 Closeout

SHIP Annual Report

Sumter County 2007 Interim-1

Report Status: Unsubmitted

Form 1

SHIP Distribution Summary

Homeownership

Code	Strategy	Expended Amount	Units	Encumbered Amount	Units	Unencumbered Amount	Units
6	Emergency Repair	\$19,557.00	5				
3	Home Rehabilitation	\$226,999.53	10	\$45,475.82	1		
2	Home Purchase	\$466,219.11	20				
Homeownership Totals:		\$712,775.64	35	\$45,475.82	1		

Rentals

Code	Strategy	Expended Amount	Units	Encumbered Amount	Units	Unencumbered Amount	Units
23	Rent Deposits	\$6,948.00	14				
Rental Totals:		\$6,948.00	14				
Subtotals:		\$719,723.64	49	\$45,475.82	1		

Additional Use of Funds

Use	Expended	Encumbered	Unencumbered
Administrative	\$76,205.80		
Homeownership Counseling			
Admin From Program Income	\$3,052.21	\$1,055.39	
Admin From Disaster Funds			

Totals: **\$798,981.65** **49** **\$46,531.21** **1** **\$0.00**

Total Revenue (Actual and/or Anticipated) for Local SHIP Trust Fund

Source of Funds	Amount
State Annual Distribution	\$762,058.00
Program Income (Interest)	\$29,071.72
Program Income (Payments)	\$53,080.19
Recaptured Funds	
Disaster Funds	
Other Funds	
Carryover funds from previous year	\$1,302.95

Total: **\$845,512.86** * Carry Forward to Next Year: \$0.00

NOTE: This carry forward amount will only be accurate when all revenue amounts and all expended, encumbered and unencumbered amounts have been added to Form 1

Rental Unit Information

Description	Eff.	1 Bed	2 Bed	3 Bed	4 Bed
Rent Deposits			\$550.00	\$725.00	\$950.00

Recap of Funding Sources for Units Produced

Source of Funds Produced through June 30th for Units	Amount of Funds Expended to Date	% of Total Value
SHIP Funds Expended	\$719,723.64	22.07%
Public Moneys Expended	\$721,011.70	22.11%
Private Funds Expended	\$1,740,349.40	53.38%
Owner Contribution	\$79,343.53	2.43%
Total Value of All Units	\$3,260,428.27	100.00%

SHIP Program Compliance Summary - Home Ownership/Construction/Rehab

Compliance Category	SHIP Funds	Trust Funds	% of Trust Fund	FL Statute Minimum %
Homeownership	\$758,251.46	\$762,058.00	99.50%	65%
Construction / Rehabilitation	\$589,747.99	\$762,058.00	77.39%	75%

Program Compliance - Income Set-Asides

Income Category	SHIP Funds Expended	SHIP Funds Encumbered	SHIP Funds Unencumbered	Total of SHIP Funds	Total Available Funds % *
Extremely Low	\$9,584.70			\$9,584.70	1.13%
Very Low	\$211,989.48	\$45,475.82		\$257,465.30	30.45%
Low	\$433,902.13			\$433,902.13	51.32%
Moderate	\$64,247.33			\$64,247.33	7.60%
Totals:	\$719,723.64	\$45,475.82	\$0.00	\$765,199.46	90.50%

Special Target Groups for Funds Expended (i.e. teachers, nurses, law enforcement, fire fighters, etc.) Set Aside

Description	Special Target Group	Expended Funds	Total # of Expended Units

Project Funding for Expended Funds Only

Income Category	Total Funds Mortgages, Loans & DPL's	Mortgages, Loans & DPL Unit #s	Total Funds SHIP Grants	SHIP Grant Unit #s	Total SHIP Funds Expended	Total # Units
Extremely Low	\$9,584.70	10			\$9,584.70	10
Very Low	\$205,409.48	12	\$6,580.00	2	\$211,989.48	14
Low	\$420,925.13	15	\$12,977.00	3	\$433,902.13	18
Moderate	\$64,247.33	7			\$64,247.33	7

Totals:	\$700,166.64	44	\$19,557.00	5	\$719,723.64	49
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Form 3**Number of Households/Units Produced**

Description	List Unincorporated and Each Municipality	ELI	VLI	Low	Mod	Total
Emergency Repair	Sumter County		1	3		4
Emergency Repair	Wildwood		1			1
Home Rehabilitation	Center Hill			1		1
Home Rehabilitation	Sumter County	1	4	3		8
Home Rehabilitation	Webster		1			1
Home Purchase	Bushnell			1	2	3
Home Purchase	Sumter County		2	8	4	14
Home Purchase	Wildwood			2	1	3
Rent Deposits	Bushnell	4	2			6
Rent Deposits	Sumter County	2				2
Rent Deposits	Wildwood	2	3			5
Rent Deposits	Webster	1				1
Totals:		10	14	18	7	49

Characteristics/Age (Head of Household)

Description	List Unincorporated and Each Municipality	0 - 25	26 - 40	41 - 61	62+	Total
Emergency Repair	Sumter County			2	2	4
Emergency Repair	Wildwood				1	1
Home Rehabilitation	Center Hill				1	1
Home Rehabilitation	Sumter County			2	6	8
Home Rehabilitation	Webster				1	1
Home Purchase	Bushnell		1	1	1	3
Home Purchase	Sumter County	2	6	4	2	14
Home Purchase	Wildwood		2	1		3
Rent Deposits	Bushnell	3	3			6
Rent Deposits	Sumter County	1	1			2
Rent Deposits	Wildwood	1	1	3		5
Rent Deposits	Webster			1		1
Totals:		7	14	14	14	49

Family Size

Description	List Unincorporated and Each Municipality	1 Person	2-4 People	5+ People	Total
Emergency Repair	Sumter County	2	2		4
Emergency Repair	Wildwood	1			1
Home Rehabilitation	Center Hill	1			1
Home Rehabilitation	Sumter County	1	7		8
Home Rehabilitation	Webster	1			1
Home Purchase	Bushnell		3		3
Home Purchase	Sumter County	4	9	1	14
Home Purchase	Wildwood	1	2		3
Rent Deposits	Bushnell		5	1	6
Rent Deposits	Sumter County		1	1	2
Rent Deposits	Wildwood	1	4		5
Rent Deposits	Webster		1		1
Totals:		12	34	3	49

Race (Head of Household)

Description	List Unincorporated and Each Municipality	White	Black	Hisp- anic	Asian	Amer- Indian	Other	Total
Emergency Repair	Sumter County	4						4
Emergency Repair	Wildwood		1					1
Home Rehabilitation	Center Hill	1						1
Home Rehabilitation	Sumter County	2	6					8
Home Rehabilitation	Webster		1					1
Home Purchase	Bushnell	1	1	1				3
Home Purchase	Sumter County	12	1	1				14
Home Purchase	Wildwood	3						3
Rent Deposits	Bushnell		4	2				6
Rent Deposits	Sumter County		2					2
Rent Deposits	Wildwood		5					5
Rent Deposits	Webster	1						1
Totals:		24	21	4				49

Special Needs (Any Member of Household)

Description	List Unincorporated and Each Municipality	Farm Worker	Devel. Dis-abled	Home-less	Elderly	Special Needs	Special Needs	Total
Emergency Repair	Sumter County				2			2
Emergency Repair	Wildwood				1			1

Home Rehabilitation	Center Hill				1			1
Home Rehabilitation	Sumter County				6	1		7
Home Rehabilitation	Webster				1			1
Home Purchase	Bushnell				1			1
Home Purchase	Sumter County					3		3
Home Purchase	Wildwood		1					1
Rent Deposits	Bushnell					1		1
Rent Deposits	Sumter County							0
Rent Deposits	Wildwood					2		2
Rent Deposits	Webster					1		1
Totals:			1		12	8		21

Form 4

Incentive Strategy:

Adopting Ordinance or Resolution Number or identify local policy:

Implementation Schedule (Date):

Has the plan or strategy been implemented? If no, describe the steps that will be taken to implement the plan:

Status of Strategy - (is the strategy functioning as intended, i.e. are the time frames being met, etc.):

Expended Funds

\$719,724.00

Strategy	Full Name	Address	City	Zip Code	Expended Funds	Unit Counted
Emergency Repair	Betty Vann	1737 W Hwy 48	Bushnell	33513	\$3,880.00	<input type="checkbox"/>
Emergency Repair	Kitty Warden	2879 CR 617	Bushnell	33513	\$5,987.00	<input type="checkbox"/>
Emergency Repair	Michael & Lisa Jarrett	5298 CR 634S	Bushnell	33513	\$3,570.00	<input type="checkbox"/>
Emergency Repair	Jacklin Golz	790 CR 474	Lake Panasoffkee	33538	\$3,420.00	<input type="checkbox"/>
Emergency Repair	Geneva Johnson	505 Mill Street	Wildwood	34785	\$2,700.00	<input type="checkbox"/>
Home Rehabilitation	Gary Luman	8308 CR 643	Bushnell	33513	\$17,864.98	<input type="checkbox"/>
Home Rehabilitation	Alean Baker	344 CR 552N	Bushnell	33513	\$15,765.51	<input type="checkbox"/>
Home Rehabilitation	Isaac Anderson	3958 SE 108th Lane	Webster	33597	\$12,365.24	<input type="checkbox"/>

Home Rehabilitation	Bia Dora Edwards	9260 CR 241	Wildwood	34785	\$5,111.70	<input type="checkbox"/>
Home Rehabilitation	Willean James	9090 CR 241	Wildwood	34785	\$35,575.45	<input type="checkbox"/>
Home Rehabilitation	Roy & Betty Kelly	2835 CR 426E	Lake Panasoffkee	33538	\$2,199.75	<input type="checkbox"/>
Home Rehabilitation	Bernice Robinson	7051 CR 213	Wildwood	34785	\$16,818.15	<input type="checkbox"/>
Home Rehabilitation	Diana Rigsby	10760 CR 723	Webster	33597	\$790.65	<input type="checkbox"/>
Home Rehabilitation	Louise Anderson	103 N Magnolia Avenue	Center Hill	33514	\$63,047.85	<input type="checkbox"/>
Home Rehabilitation	Gertrude Hadley	772 NW 5th Street	Webster	33597	\$57,460.25	<input type="checkbox"/>
Home Purchase	Richard & Vivian Budden	419 Southland Avenue	Bushnell	33513	\$7,721.30	<input type="checkbox"/>
Home Purchase	Frank & Georgla Wilkerson	802 Osceola Avenue	Wildwood	34785	\$10,000.00	<input type="checkbox"/>
Home Purchase	Karen Baker	1284 CR 463	Lake Panasoffkee	33538	\$38,515.64	<input type="checkbox"/>
Home Purchase	Darrell Andrews	2826 CR 526	Sumterville	33585	\$10,000.00	<input type="checkbox"/>
Home Purchase	Laura Richardson	973 CR 455	Lake Panasoffkee	33538	\$30,000.00	<input type="checkbox"/>
Home Purchase	Gerardo & Donna Quiroz-Naranjo	307 W Parkhill Avenue	Bushnell	33513	\$30,000.00	<input type="checkbox"/>
Home Purchase	Mandalyn Robitzer	2614 SE 75th Boulevard	Bushnell	33513	\$10,000.00	<input type="checkbox"/>
Home Purchase	David & Nereida Gainey	409 S Justice Street	Bushnell	33513	\$8,426.03	<input type="checkbox"/>
Home Purchase	Roberta Douglas	1934 E CR 462	Wildwood	34785	\$30,000.00	<input type="checkbox"/>
Home Purchase	Edgard Rivera	2918 CR 756A	Webster	33597	\$8,100.00	<input type="checkbox"/>
Home Purchase	Sara Lassiter	509 Barwick Street	Wildwood	34785	\$29,200.00	<input type="checkbox"/>
Home Purchase	Laura Sizemore	2884 SE 75th Boulevard	Bushnell	33513	\$30,000.00	<input type="checkbox"/>
Home Purchase	Derek Burdine	12393 NE 50th View	Oxford	34484	\$30,000.00	<input type="checkbox"/>
Home Purchase	Reba Coe	171 CR 491W	Lake Panasoffkee	33538	\$24,636.00	<input type="checkbox"/>
Home Purchase	Crystal Knight	3261 CR 521	Coleman	33521	\$10,000.00	<input type="checkbox"/>
Home Purchase	David Young	1351 CR 437	Lake Panasoffkee	33538	\$29,620.14	<input type="checkbox"/>
Home Purchase	Jana Matson	5052 NE 121st Avenue	Oxford	34484	\$30,000.00	<input type="checkbox"/>
Home Purchase	Timothy Fox	7692 CR 575	Bushnell	33513	\$30,000.00	<input type="checkbox"/>
Home Purchase	Angela Grant	2796 SE 75th Boulevard	Bushnell	33513	\$30,000.00	<input type="checkbox"/>

Home Purchase	Vonice Edwards	1281 CR 443	Lake Panasoffkee	33538	\$40,000.00	<input type="checkbox"/>
Rent Deposits	Moses Hughes	406 Peters Street	Wildwood	34785	\$500.00	<input type="checkbox"/>
Rent Deposits	Judy Vasquez	1000 Meadows Circle #30	Bushnell	33513	\$493.00	<input type="checkbox"/>
Rent Deposits	Ebony Elder	110 N Jasper Street	Bushnell	33513	\$500.00	<input type="checkbox"/>
Rent Deposits	Bridgett Woods	106 N Jasper Street	Bushnell	33513	\$500.00	<input type="checkbox"/>
Rent Deposits	JoAnne Stephens	719 Hence Street	Wildwood	34785	\$500.00	<input type="checkbox"/>
Rent Deposits	Valerie Strong	205 Mill Street	Wildwood	34785	\$500.00	<input type="checkbox"/>
Rent Deposits	Crystal Hunt	404 Peters Street	Wildwood	34785	\$475.00	<input type="checkbox"/>
Rent Deposits	Lela Hunt	10431 SW 60th Terrace	Bushnell	33513	\$500.00	<input type="checkbox"/>
Rent Deposits	Carolyn Mobley	775 Huey St. #B-2	Wildwood	34785	\$500.00	<input type="checkbox"/>
Rent Deposits	Tameya Purvis	301 E Gulf Atlantic Hwy #15	Wildwood	34785	\$480.00	<input type="checkbox"/>
Rent Deposits	Maul & Carol Diaz	323 W Parker Avenue	Bushnell	33513	\$500.00	<input type="checkbox"/>
Rent Deposits	Kathy Prevatt	64 SE 2nd Street	Bushnell	33513	\$500.00	<input type="checkbox"/>
Rent Deposits	Tora James	215 Rosewood St Apt A	Bushnell	33513	\$500.00	<input type="checkbox"/>
Rent Deposits	Brigitte Mitchell	200 Jumper Dr S Apt A-1	Bushnell	33513	\$500.00	<input type="checkbox"/>

Sumter County 2007 Interim-1

SHIP Annual Report

Sumter County 2008 Interim-2

Report Status: Unsubmitted

Form 1

SHIP Distribution Summary

Homeownership

Code	Strategy	Expended Amount	Units	Encumbered Amount	Units	Unencumbered Amount	Units
6	Emergency Repair	\$1,098.87	1	\$5,850.00	1	\$54,081.89	6
3	Home Rehabilitation			\$220,585.95	6	\$150,000.00	2
2	Home Purchase	\$165,348.25	6	\$80,000.00	4	\$150,000.00	6
Homeownership Totals:		\$166,447.12	7	\$306,435.95	11	\$354,081.89	14

Rentals

Code	Strategy	Expended Amount	Units	Encumbered Amount	Units	Unencumbered Amount	Units
23	Rent Deposits					\$12,000.00	10
Rental Totals:						\$12,000.00	10

Subtotals: \$166,447.12 7 \$306,435.95 11 \$366,081.89 24

Additional Use of Funds

Use	Expended	Encumbered	Unencumbered
Administrative	\$43,526.11		\$46,014.29
Homeownership Counseling			
Admin From Program Income			\$1,742.18
Admin From Disaster Funds			

Totals: \$209,973.23 7 \$306,435.95 11 \$413,838.36 24

Total Revenue (Actual and/or Anticipated) for Local SHIP Trust Fund

Source of Funds	Amount
State Annual Distribution	\$895,404.00
Program Income (Interest)	-\$1,019.72
Program Income (Payments)	\$35,863.26
Recaptured Funds	
Disaster Funds	
Other Funds	
Carryover funds from previous year	\$.00

Total: \$930,247.54 * Carry Forward to Next Year: \$.00

NOTE: This carry forward amount will only be accurate when all revenue amounts and all expended, encumbered and unencumbered amounts have been added to Form 1

Rental Unit Information

Description	Eff.	1 Bed	2 Bed	3 Bed	4 Bed
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Recap of Funding Sources for Units Produced

Source of Funds Produced through June 30th for Units	Amount of Funds Expended to Date	% of Total Value
SHIP Funds Expended	\$166,447.12	25.03%
Public Moneys Expended	\$162,000.00	24.36%
Private Funds Expended	\$334,622.00	50.32%
Owner Contribution	\$1,879.43	.28%
Total Value of All Units	\$664,948.55	100.00%

SHIP Program Compliance Summary - Home Ownership/Construction/Rehab

Compliance Category	SHIP Funds	Trust Funds	% of Trust Fund	FL Statute Minimum %
Homeownership	\$826,964.96	\$895,404.00	92.36%	65%
Construction / Rehabilitation	\$726,964.96	\$895,404.00	81.19%	75%

Program Compliance - Income Set-Asides

Income Category	SHIP Funds Expended	SHIP Funds Encumbered	SHIP Funds Unencumbered	Total of SHIP Funds	Total Available Funds % *
Extremely Low		\$76,036.95	\$32,081.89	\$108,118.84	11.62%
Very Low	\$40,000.00	\$99,319.50	\$134,000.00	\$273,319.50	29.38%
Low	\$116,447.12	\$111,079.50	\$100,000.00	\$327,526.62	35.21%
Moderate	\$10,000.00	\$20,000.00	\$100,000.00	\$130,000.00	13.97%

Totals: \$166,447.12 \$306,435.95 \$366,081.89 \$838,964.96 90.19%

Special Target Groups for Funds Expended (i.e. teachers, nurses, law enforcement, fire fighters, etc.) Set Aside

Description	Special Target Group	Expended Funds	Total # of Expended Units
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Project Funding for Expended Funds Only

Income Category	Total Funds Mortgages, Loans & DPL's	Mortgages, Loans & DPL Unit #s	Total Funds SHIP Grants	SHIP Grant Unit #s	Total SHIP Funds Expended	Total # Units
Extremely Low					\$0.00	0
Very Low	\$40,000.00	1			\$40,000.00	1
Low	\$115,348.25	4	\$1,098.87	1	\$116,447.12	5
Moderate	\$10,000.00	1			\$10,000.00	1

Totals: \$165,348.25 6 \$1,098.87 1 \$166,447.12 7

Form 3

Number of Households/Units Produced

Description	List Unincorporated and Each Municipality	ELI	VLI	Low	Mod	Total
Emergency Repair	Bushnell			1		1
Home Purchase	Bushnell				1	1
Home Purchase	Sumter		1	2		3
Home Purchase	Wildwood			2		2
Totals:			1	5	1	7

Characteristics/Age (Head of Household)

Description	List Unincorporated and Each Municipality	0 - 25	26 - 40	41 - 61	62+	Total
Emergency Repair	Bushnell				1	1
Home Purchase	Bushnell	1				1
Home Purchase	Sumter	1	1	1		3
Home Purchase	Wildwood	1	1			2
Totals:		3	2	1	1	7

Family Size

Description	List Unincorporated and Each Municipality	1 Person	2-4 People	5+ People	Total
Emergency Repair	Bushnell		1		1
Home Purchase	Bushnell		1		1
Home Purchase	Sumter		3		3
Home Purchase	Wildwood		2		2
Totals:			7		7

Race (Head of Household)

Description	List Unincorporated and Each Municipality	White	Black	Hisp- anic	Asian	Amer- Indian	Other	Total
Emergency Repair	Bushnell	1						1
Home Purchase	Bushnell			1				1
Home Purchase	Sumter	3						3
Home Purchase	Wildwood	1	1					2
Totals:		5	1	1				7

Special Needs (Any Member of Household)

Description	List Unincorporated and Each Municipality	Farm Worker	Devel. Dis-abled	Home-less	Elderly	Special Needs	Special Needs	Total
Emergency Repair	Bushnell				1			1
Home Purchase	Bushnell							0
Home Purchase	Sumter		1					1
Home Purchase	Wildwood							0
Totals:			1		1			2

Form 4

Incentive Strategy:

Adopting Ordinance or Resolution Number or identify local policy:

Implementation Schedule (Date):

Has the plan or strategy been implemented? If no, describe the steps that will be taken to implement the plan:

Status of Strategy - (is the strategy functioning as intended, i.e. are the time frames being met, etc.):

Expended Funds

\$166,447.00

Strategy	Full Name	Address	City	Zip Code	Expended Funds	Unit Counted
Emergency Repair	Eugene & Norma Goyer	301 W Hunt Avenue	Bushnell	33513	\$1,098.87	<input type="checkbox"/>
Home Purchase	Victoria Vega	616 E Central Avenue	Bushnell	33513	\$10,000.00	<input type="checkbox"/>
Home Purchase	Christopher Houck	3025 CR 521	Coleman	33521	\$40,000.00	<input type="checkbox"/>
Home Purchase	Stephen Jerinsky	4185 CR 683	Webster	33597	\$25,348.25	<input type="checkbox"/>
Home Purchase	Matthew Meskil	829 Powell Street	Wildwood	34785	\$30,000.00	<input type="checkbox"/>
Home Purchase	Wayne Saunders	3970 N CR 470	Lake Panasoffkee	33538	\$30,000.00	<input type="checkbox"/>
Home Purchase	Erkia Douglas	208 Lemon Street	Wildwood	34785	\$30,000.00	<input type="checkbox"/>

Sumter County 2008 Interim-2

CERTIFICATION
For Implementation of
Regulatory Reform Activities
Required by S.H.I.P.

On behalf of Sumter County, I hereby certify that the following information
(NAME OF LOCAL GOVERNMENT)
is true and accurate as of the date of submission:

- 1) Permits as defined in s.163.3164(7) and (8)* for affordable housing projects are expedited to a greater degree than other projects; and
- 2) There is an ongoing process for review of local policies, ordinances, regulations, and plan provisions that increase the cost of housing prior to their adoption.
- 3) The cumulative cost per newly constructed housing per housing unit, from these actions for **FY08/09s estimated to be \$ 0.00.
- 4) The cumulative cost per rehabilitated housing per housing unit, from these actions for **FY08/09s estimated to be \$ 0.00.

Date _____
Witness _____ Chief Elected Official _____
Date 9/8/09

Garry Breeden, Chairman
(Type) Name and Title

Date _____
Witness _____ County/City Administrator _____
(whichever applies)

(Type) Name and Title

Or

Date _____
Attest (Seal)

* 163.3164(7) of the Florida Statutes: "Development order" means any order granting, denying, or granting with conditions an application for a development permit. 163.3164(8) of the Florida Statutes: "Development permit" includes any building permit, zoning permit, subdivision approval, rezoning, certification, special exception, variance, or any other official action of local government having the effect of permitting the development of land.

CERTIFICATION

On behalf of Sumter County, I hereby certify that the information presented
(NAME OF LOCAL GOVERNMENT)
herein is true and accurate as of the date of submission.

Witness Date _____ Chief Elected Official or Designee Date 9/8/09

Witness Date _____ Garry Breeden, Chairman Date 9/8/09
(Type) Name and Title

Or

Attest (Seal) Date _____

GENERAL INFORMATION

Name of Person to call regarding the Annual Report Form: Kathy Young

Telephone Number: (352) 793-0272